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# PURCHASING USER MANUAL

## SPLITTING PURCHASE ORDER LINE ITEMS

### INTRODUCTION

A purchaser can split a requisition line item in order to purchase by separate item numbers or descriptions. For example, a single line item request for a computer may need to be split into separate purchase order line items as a computer, monitor, keyboard, and mouse. A purchaser can change the Item #, Description, Quantity, Unit of Measurement, and Price. A purchaser cannot split requisition line items to change the fiscal coding.

### TO SPLIT PURCHASE ORDER LINE ITEMS

After selecting the requisition line items and saving the purchase order, Use the line item **Menu** on the **PO** screen.

1. Click **Menu** next to the line item that you need to split.
2. Click **Split Line Item**. (If the quantity (**Qty**) is greater than 2, you can also click **Split All Line Items** to create separate rows for each single item.)

Figure 1 - Line item Menu

The screenshot shows a Purchase Order screen with a total of \$534.00. The PO was created and edited by JAMES CARTER on 04/18/2008. A 'Delete PO' button is in the top right. Below the header, there are checkboxes for 'View Selected Items', 'Vendor Info', 'Coding Info', and 'Receiving Info'. The main table has columns: Sel, Menu, Req #, Need By, Notes, Atch, Status, Item #, Description, Qty, U/M, Price, and SubTotal. The first row is selected, showing 'Menu 6546 S 04/25/2008' and 'Assigned to PO 333-ABC Binoculars' with a quantity of 6 and a price of 89.00. A context menu is open over the 'Menu' field, listing options: Reject Line Item, Cancel Line Item, Split Line Item (highlighted), Split All Line Items, Edit Vendor Bids, Show History, Show Full Description, Edit Ship-To Address, and Edit Bill-To Address.

3. Click **OK** in the confirmation dialogue box.
4. The split line will be a duplicate of the original. The quantity (**Qty**) of the new line is '1' and the original line's quantity is reduced by one.

Figure 2 - New split line

The screenshot shows the same Purchase Order screen, but now there are two line items. The first line item is 'Menu 6546 S 04/25/2008' with a quantity of 5 and a price of 89.00, totaling 445.00. The second line item is 'Menu 6546 S 04/25/2008' with a quantity of 1 and a price of 89.00, totaling 89.00. The total for the PO is now \$534.00. The 'Split Line Item' option from the context menu in Figure 1 has been used to create this second line item.

- Change the line items as needed. A purchaser can change only the Item #, Description, Quantity, Unit of Measurement, and Price. In this example, the manufacturer's model number has changed for two of the items and this is shown in the quantity (**Qty**) and **Item #** fields.

Figure 3 - Changed item number and quantity

Status: **In Purchasing**

Total: \$534.00 PO Created JAMES CARTER (04/18/2008) PO Edited JAMES CARTER (04/18/2008) [Delete PO](#)

☒ View Selected Items ☐ Vendor Info ☐ Coding Info ☐ Receiving Info

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal
<input checked="" type="checkbox"/>	Menu <a href="#">6546-S</a>	04/25/2008			Assigned to PO	333-ABC	Binoculars	3	Each	89.00	445
<input checked="" type="checkbox"/>	Menu <a href="#">6546-S</a>	04/25/2008			Assigned to PO	8456AMC	Binoculars	2	Each	89.00	89

- Click **Save** when finished.
- Depending on your agency's process, the purchase order can be approved and/or ordered when finished.
- Split lines can be deleted, but the original line cannot.
- The requisition will be automatically updated and the requester can also see the split items on the **Requisitions** screen.

Figure 4 - Requisition with split line items

**Status** **Requisition** **Approval** **Reports**

Department: RAD: Research and Development Req # [6546-S](#) Tracking # 298 [New Requisition](#) [Save](#)

Need by: [04/25/2008](#) All or Nothing ☐ Req Notes [Req Atch](#)

Desc: [Binoculars](#)

Status: **Ordered**

Requested by: JAMES CARTER (04/18/2008) Edited by: JAMES CARTER (04/18/2008)

[Add Item](#)

Total: \$445.00 ☐ Vendor Info ☐ Coding Info ☐ Receiving Info

Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal	Workflow
Menu <a href="#">Notes</a>	<a href="#">Atch</a>	Ordered	333-ABC	Binoculars	3	Each	89.00	267.00	walkthru
Menu <a href="#">Notes</a>	<a href="#">Atch</a>	Ordered	8456AMC	Binoculars	2	Each	89.00	178.00	walkthru